

# Initial Visit Form

Please complete/submit this form. If answers are not complete and/or accurate, this form may be returned without authorization. This form is required if the Patients condition requires care beyond one visit. Please note, be as detailed/accurate as possible. If not, additional information may be required upon request. Copies of this form and more are at [www.SoteriaHealthcare.com/downloads](http://www.SoteriaHealthcare.com/downloads). Questions, please call 770-455-8190 ext 119 or fax # 404-341-9804

**SECTION 1. TREATING DOCTOR INFORMATION**

Date: \_\_\_\_\_ Treating Doctor: \_\_\_\_\_  
Office Tel. \_\_\_\_\_ Office Fax: \_\_\_\_\_ Office Email: \_\_\_\_\_

**SECTION 2. PATIENT AND INSURANCE INFORMATION**

Patient Type  New to my office or  Est. Patient (If Est. Patient, select type):  New episode  New injury **IMPORTANT** **DONT FORGET**  
Patient/Member Last Name: \_\_\_\_\_ Member First Name: \_\_\_\_\_

Member ID#: \_\_\_\_\_ Patient/Member Date of Birth: \_\_\_\_\_ Sex: \_\_\_\_\_

Is Patient a dependent?  Yes  No Health Plan Name: \_\_\_\_\_

This Case Is ...  Group Health  Workers Comp  Auto Liability

Is Kaiser Permanente the Patient's primary insurance carrier?  Yes  No

Please note: Member/Patient must complete & sign the "Primary Payor Information Form" at the beginning of each year or if Member/Patient health insurance has changed. You may download and have the Member complete this form here: [www.SoteriaHealthcare.com/downloads](http://www.SoteriaHealthcare.com/downloads)

**SECTION 3. TREATMENT INFORMATION**

**LINE 1.** Has the Doctor treated this Patient within the past 12-mos. (for any condition). (check one)  Yes  No

Please list all diagnoses for which you have treated this Patient in the past 12-months.

LINE 2. All Diagnoses (Past 12 Mos)	ICD-10 Code(s)	# of Treatments	Start Date	End Date
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**LINE 3.** Date when current condition began? \_\_\_\_\_ Date of first visit for current course of treatment? \_\_\_\_\_

LINE 4. Current Diagnoses	ICD-10 Code
_____	_____
_____	_____
_____	_____

**LINE 5.** Etiology or cause of current condition: \_\_\_\_\_

**LINE 6.** Current subjective complaints:  
A. \_\_\_\_\_ C. \_\_\_\_\_  
B. \_\_\_\_\_ D. \_\_\_\_\_

**LINE 7.** Positive test(s) which confirm you diagnosis:  
A. \_\_\_\_\_ C. \_\_\_\_\_  
B. \_\_\_\_\_ D. \_\_\_\_\_

**SECTION 4. VISIT ESTIMATE TO COMPLETE ACUTE PHASE OF TREATMENT**

**LINE 1.** "Treating Doctor estimates a total of \_\_\_\_\_ # of visits over \_\_\_\_\_ days or \_\_\_\_\_ weeks."  
**LINE 2.** Prognosis: \_\_\_\_\_ On a scale of 1 to 10 what is Patients pain level? \_\_\_\_\_  
**LINE 3.** Additional Treating Doctor Comments (Optional) \_\_\_\_\_

Treating Doctor's Signature **IMPORTANT** \_\_\_\_\_ Date \_\_\_\_\_

THIS SECTION IS FOR SOTERIA INTERNAL USE ONLY. Please do not write in this box.